



Procurement News - Near and FAR

Volume II, No. 3

July/August 1997

Introduction

Welcome to the July/August edition of Treasury's Procurement News - Near and **FAR**. This issue highlights the new OPM qualification standards for GS-1102s, a performance measurement update, procurement streamlining success stories, Bureau Highlights, and acquisition reform policy updates.

The editor for the next newsletter will be Angelie Jackson, and the deadline for submission of articles is October 15, 1997. The next and all following volumes will be issued quarterly. Proposed articles as well as comments or suggestions regarding this newsletter can be provided to Angelie Jackson at 622-0245 or "angelie.jackson@treas.sprint.com".

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TREASURY NOTES

by Robert A. Welch
Procurement Executive



The Procurement Manager of the Future

Procurement, just like the rest of the world, is changing, and that change is happening faster and faster. What skills will the procurement manager of the future need? I've been interested in this subject for some time. Whenever I saw an article, research paper or anything else dealing with this subject, I'd read it and then toss it in a folder. A few months ago, I enlisted Tim Shaughnessy, U.S. Secret Service, to help me synopsize and organize these materials into a single product; a manuscript outline which would serve as the basis for a study paper. We're now at that stage . . . a 10-page

outline which summarizes the work of 20 or so experts from Professor Ralph Nash to a senior principal from McKinsey and Company. And, interspersed throughout are my own thoughts, those of several of your bureau chief procurement officers and others. I plan to continue to refine this outline and add some new research coming out soon from the Center for Advanced Purchasing Studies. Then, I'll write it all up. In June, I made a presentation on this at a Commerce Department procurement/IT conference. In July, I had the opportunity to present this information to Steve Kelman and the Federal Procurement Council, the senior procurement executives from all government agencies. Both presentations were well received and resulted in a good, open exchange of ideas. The Energy Department has now asked me to attend the annual conference they have with their Management and Operations contractor procurement staffs to talk about this.

When you boil all of this down, it

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comes out in three buckets -- teams and teamwork, outcomes/ results, and as the late Carl Sagan said, "evolve or die." Obviously, there is a lot more to it than this. But one thing is for sure: If you don't keep up, you will be left behind.

What can you do today? Play team ball. Ask others for their ideas. Share credit with your colleagues. Reach out and look for work. Ask your boss or coworkers, "How can I help you?" When you see a problem coming, do something about it before it becomes a bigger one. Look for ways to solve problems. Don't create them. Strive for results. Don't just mechanically follow processes. Think, analyze and then act. Keep a customer focus. Change to meet their needs. Don't make them change to meet yours. And, finally, believe in yourself and your ideas.

These skills and abilities don't come easily. They take work and they take continuous training. Why do you think I'm doing this research? I'm just trying to keep up!

You have the best training organization, Treasury Acquisition Institute (TAI), available to you. And from what I can see, your managers understand the value of continuous learning and are willing to let you attend the wide range of TAI courses. Annually, TAI offers you more than 100 formal training courses in procurement, interpersonal skills, and automation. TAI also offers you more than 500 self-study (i.e., video, audio, computer-based) courses through the TAI Personal Development Center. Many of the self-study courses/materials have been acquired from nationally acclaimed institutions, such as the Wharton Business School Executive Education videotape series. Another valuable TAI offering is the Certified Professional Contracts Manager (CPCM) preparatory course. TAI offers this twice a year through the Florida Institute of Technology. Participants can prepare to pass the CPCM exam and earn three college credits by successfully completing this course. All the TAI courses are great for enhancing your job skills and personal development and helping you get ready for the future.

With the new 1102 series qualification standards now official, a college education has become a must for most of you. In the broader spectrum of procurement jobs (government and private sector), college degrees are generally required. TAI can assist you in providing information about colleges, degrees, and strategies for degree completion within the constraints of work and your personal life. Procurement professionals of the future must be educated, and highly trained.

As I've recommended before, join professional organizations like the National Contract Management Association, the

National Association of Purchasing Management, the National Association of Black Procurement Professionals or the National Institute of Government Purchasing. Also, spend time on the Internet (see recommended Web sites in the July/August 1996 issue of Near and Far), where many of your professional colleagues are talking to each other, asking each other questions and sharing best practices. Join in and you too will be on your way to become the procurement manager of the future.

Performance Measurement Update

by Terri T. Toplisek

The U.S. Mint has completed the process of entering the data from the procurement performance measurement customer, employee, and self-assessment surveys and has compiled the glyphs, spreadsheets (raw data), and employee comments for each bureau. This information was mailed to each BCPO on June 30th for their review and use in further improving their procurement operations.

Special thanks to Joe Hoback and members of his staff - Joan Tuenge and Jill Daly for their diligence in leading the performance measurement program and this second round of surveys. Also, thank you to Richard Miller for compiling the responses to the open-ended questions on the customer surveys.

The survey results were discussed at the July 24th BCPO meeting. Joan Tuenge and Jill Daly distributed additional glyphs and graphs to each bureau. Joan Tuenge recognized Jill Daly with an on-the-spot cash award for her work in the survey process.

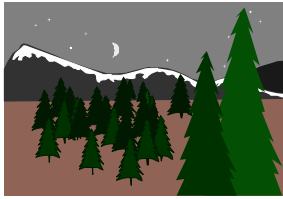
Treasury Intern Meeting

by Darryl Grant

On July 2, Treasury's new interns, Ron Venable and Karen Galloway, as well as new Customs' employees, David Penn and John Forrester, had an opportunity to meet and hear about the experiences of two former Treasury interns, Christina Abbasi and Julie Hart, who graduated from the program. Both of the former interns found the experience to have greatly broadened their horizons in the acquisition arena. As part of the meeting, Kevin Whitfield spoke about the integral role of past performance in the evaluation



process and Mary Ellen Dorsey and Kevin Boshears elaborated on the importance of the Small Business Program in contracting. Of particular interest was Kevin's demonstration of Treasury's Contractor Profile Database (TCPD), an automated database



where small, minority and women-owned businesses can register their company. This database is available via Treasury's home page (<http://www.ustreas.gov>) on the Internet and eliminates the need for vendors to file separate SF 129's with each of Treasury's bureaus. TCPD is currently available via the intranet to bureaus for conducting market research. The Department looks forward to conducting many similar meetings in the future.

Bureau Chief Procurement Officer Meeting

On July 24th, the BCPO's and the Office of Procurement met to discuss a variety of topics. Ted Kasna, BCPO, U.S. Customs, and company demonstrated the Intranet based "Electronic Catalogs in Treasury." The Acting BCPO for the Mint, Joan Tuenge and staff discussed the overall results of the latest PMAT Survey. Karen Reed, FMS, gave an informed presentation on FMS' Past Performance Database. Finally, Nick Nayak, IRS, discussed "Professionalization of the Procurement Workforce."

A "Huge" Thank You to all Bureaus

The Office of Procurement was recently tasked, as were all Executive agencies, to quickly gather information for the Department of Commerce (DOC). The Office of Federal Procurement Policy had identified 94 contracts from the Federal Procurement Data System, from which Treasury had to provide information. This data was needed to study various issues relating to Post-Adarand. Our timeframe for gathering the information was extremely limited. All bureaus involved responded in record time and Treasury submitted all of the required information within a day or so of the actual due date. Thanks to all of you who participated. It is challenging enough to meet all the demands of the end of the fiscal year. Your positive and efficient response to the "call" did not go unnoticed.

BUREAU OF ALCOHOL, TOBACCO AND FIREARMS

by Martha Lanigan

The Bureau of Alcohol, Tobacco and Firearms (ATF) was one of the first Treasury bureaus to use the Government purchase card starting with the pilot program at the Department of Commerce in 1986. Presently they are the biggest card user in the Department with roughly 65% of their employees having cards. Given that some of the law enforcement bureaus at Treasury and other agencies have been slow to adopt the program, ATF is a real leader in this area.



ATF will again lead the way in being the first Treasury bureau to use the new Corporate Payment System (CPS), the commercial software platform available from the present contractor, I.M.P.A.C. Card Services. This platform has been demonstrated to bureau purchase card liaisons, and all will be moving over to the new platform shortly following the ATF conversion. ATF plans to begin using the new software by September 1.

Among the benefits of the CPS are enhanced software which facilitates electronic reporting and elimination of paperwork. With a local area network in place, even the cardholder statements may be automated. Under the CPS, cards will be reissued but will continue to carry the familiar I.M.P.A.C. logo. The new cards will include enhanced security features provided by VISA.

Many of the cardholders at ATF use their cards for gasoline and auto maintenance and repairs. This is a legitimate and cost effective use of the card, with the gasoline tax being offset by administrative savings. Since ATF owns their vehicles, they do not have to use the GSA fleet card.

To find out more about the ATF purchase card best practices, you may call their program manager, Francis Frande at 202-927-4660.

by Kirk Markland
Director, Printing and Graphics Division

Executive Order 12873, which was issued by President Clinton on October 20, 1993, requires all agencies to recycle and to purchase products made of recycled materials. One of the products covered by that Order is copy machine paper (which we also use in fax machines and laser printers). Presently, we are required to purchase copy machine paper which is made with at least 20% post-consumer waste content.

The Office of the Federal Environmental Executive has been monitoring agency compliance with the Executive Order, and has found that copier paper purchases are the most significant area of non-compliance. Paper purchases from the General Services Administration (GSA) and the Government Printing Office (GPO) are tracked. Federal agencies purchase almost 20 billion sheets of paper from those sources annually. In FY 1996 only 20% of the copier paper purchased from GSA and GPO met the recycled content standard. Components of the Treasury Department purchase over 1 billion sheets of copier paper from those sources (5% of the total), and our overall compliance rate in FY 1996 was only 18%. Only 11% of the paper we purchased from GSA was compliant, even though, throughout FY 1996, GSA pricing for recycled content paper was lower than that for 100% "virgin fiber" content paper. The GSA Stock Numbers for white copier paper with 20% post-consumer content are: 7530-01-335-2623 for 8½ x 11"; and 7530-01-334-7817 for 8½ x 14".

The recycled content paper is required to have the same whiteness and performance specifications - there is no visual difference, and performance, in most machines, is identical. Therefore, there is rarely a legitimate reason for using other than recycled-content paper.

On June 20, 1997 the Acting Deputy Assistant Secretary (Finance and Management) sent a memorandum to Bureau Environmental Executives, with copies to bureau Procurement and Printing officials, urging awareness and compliance.

All Treasury procurement officials are encouraged to proactively address this problem. One particular area of concern, based on the rapid expansion of purchase card activity, is purchases from other than the traditional sources. Office supply stores and local paper merchants, of course, sell copier paper. Any purchases made from those sources should also comply with the Executive Order.

New Qualification Standard for GS-1102, Contracting Series

by Darryl Grant

On June 10, 1997, the Office of Personnel Management (OPM), in response to legislation aimed at improving the professionalism of the federal acquisition workforce in accordance with Section 4307(g) of the Federal Acquisition Reform Act (FARA), issued a new qualification standard for GS-1102 (contract specialist) positions in civilian agencies. The types of positions covered include contracting officers, procurement analysts, contract negotiators, contract administrators and cost/price analysts.

Under the new standard, beginning January 1, 1998, new entrants into the GS-1102 series in grades GS-5 through GS-12 will have to meet new educational requirements:

- a bachelor's degree with a major in any field; **or**
- at least 24 semester hours in any of the following fields: accounting, business, finance, law, contracts, purchasing, economics, industrial management, marketing, quantitative methods, or organization and management.

An alternative is a passing score on an examination considered acceptable by the OPM director [under consideration by OPM is the National Contract Management Association's (NCMA) Certified Professional Contracts Manager exam (CPCM) and the National Association of Purchasing Manager's (NAPM) Certified Purchasing Manager exam (CPM)].

Also beginning January 1, 1998, new entrants into the GS-1102 series at the GS-13 level or higher will have to have completed all mandatory training prescribed by the head of the agency and at least 4 years experience in contracting or related positions **and** either obtained a bachelor's degree that included or was supplemented by at least 24 semester hours in any of the following fields: accounting, business, finance, law, contracts, purchasing, economics or industrial management **or** received a waiver from the senior procurement executive of the agency **or** passed an examination considered acceptable by the OPM director.

Special Inservice Placement Provision

Current GS-1102 employees (including those hired by January 1, 1998) will be considered to have met the minimum requirements for promotion to higher positions until January 1, 2000. Effective January 1, 2000, GS-1102 employees will have to meet the new requirements in order to qualify for promotion to a grade of GS-13 or higher. Employees who occupy GS-1102 positions at grades 5 through 12 will be considered to have met the new basic requirements up to and including those classified at GS-12.

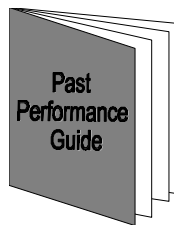


OPM has given all civilian agencies until January 1, 1998, to fully implement the new qualification standards. Accordingly, Treasury has established a Procurement Career Management Workgroup charged with transitioning the acquisition workforce and specifically to revising the Procurement Career Management Handbook. Additional details will be forthcoming as they become available. In order to determine the training and education needs of Treasury's acquisition workforce with respect to the new qualification standards, a survey has been prepared for completion by all employees in the 1102, 1105 and 1106 series.

OFPP to Publish Past Performance Guide

by Terri Toplisek

The Office of Federal Procurement Policy intends to publish the final edition of *A Guide to Best Practices for Past Performance*. The guide was written by the OFPP staff in conjunction with an interagency group that met throughout 1996.



The guide will showcase lessons learned from more than 40 contracts awarded by agencies from calendar year 1994 to 1997. It will also contain two lessons learned that were not evident when the interim edition was published. First, agencies should require less references to evaluate past performance in a particular solicitation. Five to 10 references are adequate for many source selections according to OFPP and agencies. Second, agencies should strive for more uniformity in past performance evaluations.

The final edition may be obtained by contacting Dave Muzio, OFPP Associate Administrator by e-mail at muzio_d@al.eop.gov or by fax at 395-5105.

OFPP Interim Guidance on Task and Delivery Order Contracting

by Terri Toplisek

The Office of Federal Procurement Policy (OFPP) issued interim guidance/best practices on the use of multiple award task and delivery order contracts. The guidance features best practices in key phases of the multiple award contracting process. Special emphasis is placed on the "fair opportunity to be considered" required and streamlined ordering processes.

The guidance can be obtained from the Executive Office of the President's publication office, (202)395-7322. It is also available through the Internet on the Internet on the Acquisition Reform Network (ARNET) at www.arnet.gov

Addendum to May/June 1997 Acquisition Reform Stand-Down Day article

Thanks to Karen Operacz from the U.S. Customs Service for the outstanding effort she put forth in conducting training activities at Customs.

Federal Acquisition Regulation (FAR) Update

FAR Reissued

The FAR was reissued in June 1997. It began arriving in Treasury in late July. If your office has not received copies, please contact your bureau distribution office.

Empowerment Contracting

by Kevin Whitfield

A FAR proposed rule regarding empowerment contracting, to comply with Executive Order (E.O.) 13005, was published in the April 18, 1997 of the Federal Register. E.O. 13005 established the Empowerment Contracting Program to encourage business activity in areas of business distress by providing procurement incentives to qualified businesses. Information regarding E.O. 13005 was also provided in last year's July/August edition of this newsletter.

The FAR proposed rule applies to a planned 18 month initial phase of the empowerment contracting program and for selected Standard Industrial Classification (SIC) requirements. These requirements include SIC category 15 (construction), 20 (food and kindred products), 23 (apparel and other textile products), 25 (furniture and fixtures), 27 (printing and publishing), 30 (rubber and miscellaneous

plastic products), 34 (fabricated metal products), 42 (trucking and warehousing), 51 (wholesale trade and durable goods), 73 (business services) and 87 (management consulting services). Agencies will be required to select the contracting activities that will participate in the initial phase. The selected offices are to include approximately 25% of actions under the applicable SIC categories in the empowerment contracting program. The proposed FAR changes would establish standards for offerors to be considered under the empowerment contracting program. These standards are based on activities within an "area of general economic distress" or an "area of severe economic distress." An "area of general economic distress" is defined as any census tract that has a poverty rate of at least 20% or any designated Federal Empowerment Zone, Supplemental Empowerment Zone, Enhanced Enterprise Community or Enterprise Community. An "area of severe economic distress" is defined as any census tract that has a poverty rate of at least 50%. An offeror can either self certify as to future performance or be pre-qualified by the Department of Commerce. Under the self certification standards, a small business offeror promises to pay, during contract performance at least 25% of its total wages and benefits to offerors from areas of general economic distress; or maintain physical plants and employ at least 25% of employees in such areas; or incur at least 25% of its expenses on goods, material or services from firms located in such areas. Large businesses in areas of general economic distress must meet these same wage and benefit payment requirements and in addition, must either meet the same physical plant or expense requirements or raise its wage and benefit payments to the 50% level. The 25% threshold applies to qualified businesses in areas of severe economic distress, who must meet this criteria in either its wage and benefit payment, physical plant location/hiring or goods, material and service expense activities.

The proposed FAR changes would allow contracting officers to use a 10 percent price evaluation factor or a non-price evaluation factor of up to 15 % for offerors that pre-qualify or self-certify. Such preferences are not to be used for actions below the simplified acquisition threshold, small business set-asides, 8(a) program actions or contracts performed outside the United States, its territories or Puerto Rico. The Department of Commerce also published, in the May 20, 1997 edition of the Federal Register, proposed regulations based on the proposed FAR changes. A copy of the proposed FAR and Department of Commerce guidance can be obtained by contacting Kevin Whitfield at (202) 622-0248 or kevin.whitfield@treas.sprint.com.

Part 15 Rewrite: Contracting by Negotiation

A second proposed rule on the rewrite of FAR Part 15, Contracting by Negotiation, was published in the FR on May 14, 1997. It includes a revised rewrite of Phase I originally published on September 12, 1996, that addressed acquisition techniques and source selection. Phase II addresses contract pricing and unsolicited proposals and competitive range determinations (FAR Case 96-303). The resolution of comments, based on public comments, resulted in significant changes. As a result, a new proposed rule will be published.

The following are significant changes. They are identified as they occurred initially (in phases) in the FAR part 15 rewrite process.

Phase I changes

- ! Deletion of the Model Contract Format, that will be added to the DFARS as a test;
- ! Clarification of the standard for admission into the competitive range;
- ! Deletion of language on limiting the competitive range for efficiency;
- ! Additional guidance on communications; including increasing the scope of discussions;
- ! Additional guidance on accepting late proposals; and
- ! Establishment of a common cut-off date and time for receipt of final proposal revisions.

Phase II changes

- ! FAR Subparts 15.5, 15.7, 15.8, and 15.9 were renamed and resequenced to clarify policies and procedures relative to contract pricing and commercial items;
- ! Cost or Pricing Data- separate exception for modification of contracts for commercial items has been removed; also cost and pricing data should not be obtained when a waiver has been granted by the HCA;
- ! Field pricing coverage revised;
- ! SF 1411, cover sheet for submission of cost or pricing data and the SF 1448, information other than cost or pricing, eliminated;
- ! Coverage on unbalanced pricing and unsolicited proposals revised;
- ! Requirement for a D&F to support CPAF contracts deleted; and
- ! New guidelines for cost realism added.

Comments were due July 14, 1997. The final rule should be published sometime in September. Because of the resolution of public comments, look for changes to the information above.

Reform of Affirmative Action on Federal Procurement

A proposed rule concerning programs for small disadvantaged business concerns was published in the FR on May 9, 1997. The changes conform to the Department of Justice (DOJ) proposal to reform affirmative action in federal procurement, that is designed to ensure compliance with the constitutional standards established by the Supreme Court in *Adarand Constructors, Inc. v. Peña*, 115S. Ct. 2097 (1995). The DOJ model is expected to be implemented in several parts: SBA regulations, Department of Commerce regulations; and FAR revisions. The DOJ notice and invitation for reactions and views was published on May 23, 1996 (61 CFR 26042 - 26050). This proposed rule would establish in the FAR three procurement mechanisms



benefiting small disadvantaged businesses (SDBs). These mechanisms will be authorized in certain two-digit Standard Industrial Classification Major Groups authorized by the Administrator of the Office of Federal Procurement Policy. The first mechanism is a price evaluation adjustment of up to ten

percent, that would be mandatory for those competitive procurements to which it applied. The second mechanism is a source selection evaluation factor or subfactor for planned SDB participation, primarily at the subcontract level, in the performance of a contract. This evaluation factor or subfactor would be used in competitive, negotiated acquisitions expected to exceed \$500,000 (\$1,000,000 for construction). A third mechanism provides for a monetary incentive for subcontracting with SDBs. Comments were due August 8, 1997.

Government Property

A proposed rule was published in the Federal Register on June 2, 1997. The proposed rule is intended to simplify procedures and eliminate requirements related to the management and disposition of Government property in the possession of contractors. The number of definitions is reduced and some definitions have been modified to improve clarity and achieve consistency. Comments on the proposed rule were due in writing to the FAR Secretariat on August 1, 1997.

BUREAU HIGHLIGHTS

SUCCESS STORIES

INTERNAL REVENUE SERVICE (IRS) PURCHASE CARD PROGRAM

Ten Thousand Cardholders. On May 15, 1997, the 10,000th IRS Purchase Cardholder account was established. Approximately one out of every ten IRS employees now has a card. The rapid growth of the IRS Purchase Card Program is largely attributable to budget allocation efforts. Prior to budget allocations, Procurement, and other central control points, made the buys. Even when the Purchase Card was used, maximum savings could not be achieved due to the need to process requisitions. Purchase Card expansion within the IRS has been preceded by numerous re-engineering efforts resulting in budget allocations and increased Purchase Card use by front-line field employees. As a result, the number of IRS field Procurement personnel has been substantially reduced. Ninety two percent (92%) of all IRS micro-purchases are conducted outside the Procurement offices. The number of Purchase Card transactions and expenditures continue to increase substantially. More notable, the dollar savings associated with each transaction has increased due to budget allocations which result in the most efficient use of the card.

Training video. In a joint venture with IRS Criminal Investigation, the Office of Procurement Policy scripted and produced a 23-minute Purchase Card training video. The video is being distributed for Service-wide use and will replace four hours of classroom training. Use of the video is expected to save several hundred thousand dollars by eliminating travel and classroom training costs. The video is receiving positive feedback. Except for a very brief reference to IRS 1099 reporting, which IRS cardholders must accommodate, the video is generic in content, making it potentially useful outside the IRS. Master copies of the video will be shared with all bureau Purchase Card coordinators.

FFP, IDIQ Orders. The IRS obtained a waiver to a Departmental warrant requirement, allowing non-procurement Purchase Cardholders to issue firm-fixed-priced (FFP) delivery orders up to \$100,000 against specified Indefinite Delivery/Indefinite Quantity (IDIQ) contracts. The waiver has proved useful in several situations, including:

- (a) TDA Orders. Selected non-procurement cardholders are allowed to place Purchase Card orders, up to \$100,000, from the Treasury Department Acquisition

(TDA) contracts. These contracts, awarded by the IRS, provide for computer needs throughout the Department. IRS savings from TDA Purchase Card orders by other bureaus were provided at the Departmental Purchase Card meeting held in April 1997.

(b) Emergency Office Supplies. The Treasury warrant waiver proved useful to the IRS in another, emergency situation. In May 1997, an arson fire damaged an IRS Post of Duty in Colorado Springs, Colorado. Although there were no injuries, the fire, and subsequent water damage, destroyed all supplies. The Purchase Card accounts had to be canceled, and cards were immediately reissued by Rocky Mountain BankCard System. The IRS employees were immediately assigned to temporary space, but needed approximately \$8,000 worth of supplies to do their work. Based on the Treasury warrant waiver, a one-time increase in cardholder authority allowed a non-procurement cardholder to obtain most of the needed supplies in one day by placing a single Purchase Card order from the IRS Corporate Express contract. The Corporate Express contract is a competitively awarded IDIQ contract with pre-negotiated, fixed-price line items.

IRS - TREASURY ACQUISITION INSTITUTE

Since beginning in January 1994, the Treasury Acquisition Institute (TAI) continues to be a success story that all bureaus have contributed to and shared in. In fiscal year 1997, TAI served the Treasury procurement workforce with more outstanding services as follows:

- ! TAI hosted over 150 formal training courses (procurement, interpersonal skills, automation)
- ! Through the 3rd quarter, TAI offered the following acquisition reform/new courses:
 - Alternative Disputes Resolution
 - Past Performance
 - Market Research for Contract Specialists
 - Performance-Based Service Contracting
 - Fundamentals of the Internet
 - Telecommunications Technologies for non-engineers
 - Commercial Item Acquisition
 - Research for the Acquisition Professional
 - Intermediate Cost and Price Analysis (using an AFIT instructor)
 - Oral Presentations for Contracting Personnel (ESI course)
 - New Rules for Selecting Government Contractors (ESI course)
 - 7 Habits of Highly Effective People

- Writing from the Ground Up - 8 day writing course
- ! TAI provided on-site or special request training as follows:
 - Federal Law Enforcement Training Center - Oral Presentations/Commercial Item Acquisition
 - Office of the Comptroller of the Currency - Advanced Simplified Acquisition
 - Bureau of Engraving and Printing - Alternative Disputes Resolution
 - U.S. Customs Service - Information Technology Contracting
 - Bureau of the Public Debt - Buying IT Resources: What's New!
- ! TAI acquired 3 new training rooms totaling 8,000 square feet of additional training space
- ! 19 Agencies provided funding to participate in TAI training courses

RECENT RECOGNITION

- ! Received IRS Commissioner's Award, May 1997 - this is the highest honor awarded in the IRS. TAI was recognized for its excellent caliber of training provided and for contributing to a more efficient and economical federal government by equipping Treasury employees with the education and skills needed to perform to the best of their abilities.

All bureaus are encouraged to offer suggestions for further TAI improvements and to take full advantage of the TAI facilities and resources available.

BUREAU OF ENGRAVING & PRINTING

ALTERNATIVE DISPUTE RESOLUTION (ADR) HANDBOOK

The ADR Ad Hoc Committee under the direction of the Deputy Procurement Executive for ADR, Carol Seegars, submitted the final draft of the Treasury ADR Handbook and the Conflict Resolution Provision to the Department for approval. The handbook, which covers legislative background, various techniques, cases appropriate for ADR, procedures, and drafting an ADR agreement, will serve as a guide to Treasury employees on the benefits of utilizing ADR.

Performance Measures

- ! 90% of BEP contracts awarded during the first half of FY'97 were awarded in accordance with approved

acquisition plans.

- ! 91% of the simplified acquisition requirements were completed within 30 days from the date of receipt of the requisition package for the first two quarters of FY'97.
- ! 80% of the contracts awarded during the first half of FY'97 retained a savings for the government totaling \$6,124,166.

***BEP, Office of Procurement, is continuing to provide customers with training on recent changes in procurement. This is an ongoing process designed to provide customers with the latest thinking and practices, with the main objectives of team building and expediting awards. The training is conducted by contracting officers/managers assisted by contract specialists. We have provided customers with training on: 1) Use of Oral Presentations, 2) Commercial Item Acquisition, and 3) Task/Delivery Order Contracts. We will begin training sessions on the use of Simplified Procedures for the Acquisition of Certain Commercial Items under \$5M (FAR Part 13.6). This training has considerably improved customer service, morale and expedited awards.

Customs Procurement Development Program

by Celeste Rueffert

The U.S. Customs Service recently hired three employees under the Outstanding Scholar Program. We welcomed John Forester (Davidson College), David Penn (University of Virginia), and Monica Temoney (Strayer College) to the Procurement Division, Office of Finance.

John, David, and Monica are the first employees to participate in the newly created Procurement Development Program (PDP). This program was designed by Julie Hart and Celeste Rueffert to develop knowledgeable, well rounded procurement professionals who will provide superior customer service and lead innovative acquisition management. To meet this mission, the Procurement Division has agreed to provide direction, training, and guidance to foster loyalty and dedication to the procurement profession in the U.S. Customs Service.

The two-year program has two main facets: rotational assignments within the division, and training. In addition, the PDP employees participate in group meetings, events, and field trips. While in a rotational assignment, the PDP employee is paired with a mentor and delegated work that is significant, substantive, and at increasingly difficult levels of competency. In short, the mentor totally immerses the individual in the day-to-day activities associated with the

assignment.



To make this program a success, we depend on our colleagues' assistance. We are in an interesting and evolving profession and offer these individuals the benefit of our experience. When we have an unusual or interesting meeting, or a project that would be a good learning experience, we invite the

PDP employees to participate. Through our encouragement, we are able to foster employee development and make the U.S. Customs Service Procurement Division professionally superior.

We welcome the opportunity to share our ideas for this program with other Treasury bureaus. Please contact Celeste Rueffert at 927-1267.

THE GSA TRAIL BOSS PROGRAM

*by Mark Weinstein & Karen Operacz
U.S. Customs Service*

The GSA Trail Boss Program is a professional development program designed to provide executive training in today's Information Technology (IT) competencies to Government executives, Government contracting personnel, and Government program/project managers at the GS-13 level or above. The purpose of the program is to provide attendees with the tools for enhancing the complex skills needed to acquire and implement major information technology systems.

The program focuses on Federal Information Technology (IT) acquisition, team building, and communications through the use of interactive lectures, practical exercises, workshops, and case studies. The case studies are composites of real-life situations often encountered by those in charge of major IT procurements.

The GSA Trail Boss program consists of three (3) two week seminars designed to enhance IT core competencies. Senior managers may attend one, two, or three of the seminars, in any order depending on the need. The three seminars are:

- Trail Boss I - IT Program Management (Acquisition)
- Trail Boss II - IT Program Management (Implementation)
- Trail Boss III - IT Program Management (Contracting)

We recently attended Trail Boss III in Hagerstown, MD. The Trail Boss III seminar stresses the Contracting Officers key role in information systems acquisition and management. Four (4) other contract specialists from the Internal Revenue Service (Pamela Lee, Ron Christmer, James Shotwell, and Judith Silver) also attended the seminar.

The Trail Boss seminar was an intensive learning experience; yet, it was a lot of fun in the learning also. Our professional development was enhanced through association and networking with our peers from other federal agencies.

Nineteen people were assembled in four teams. The teams quickly learned to think and act like a team to produce five skits/presentations at the seminar on topics associated with a real life IT protest case study.

The seminar provided top-notch speakers on leading edge contracting/IT topics such as Alternate Dispute Resolution (ADR), Performance Measurement, Year 2000 issues, and Performance Based Service Contracting. Vendors and IT associations also shared their perspectives on better vendor communications and on recent legislation and regulations that may impact the procurement process.

The most important ideas we came away with are that a Trail Boss graduates are expected to be a change agent when they return to their agency, and that a Trail Boss is an attitude, a way of thinking, rather than just the title of a GSA professional development seminar.

We strongly recommend the Trail Boss seminar to all Treasury procurement professionals (particularly those actively involved in awarding and administering IT Contracts), because you will learn best practices to reduce time, costs and contracting hassles. Other benefits for individuals attending Trail Boss are the enhancing of soft skills; (i.e. team work and communication), and the graduate credit for the courses given from major universities. Trail Boss also helps you understand and develop a "big picture" of the Federal IT enterprise and, most importantly, enhances your ability to network with your fellow procurement professionals at other Federal agencies.

The Trail Boss Program has been in existence since 1988 and has more than 900 graduates. The 900 Trail Boss graduates comprise the Trail Boss Interagency Committee. The graduates are invited to participate in an annual Trail Boss "Roundup" refresher class each April to bring them up to speed on the latest Procurement/IT issues that directly impact their jobs. The "Roundup" class enhances the "Esprit de Corps" established during the three training seminars.

We highly recommend the training and offer you to call us for more information. Mark Weinstein at (202) 927-0567 or Karen Operacz at (202) 927-0553.

For additional information on future course dates and registration requirements, please contact Chuck Ross, the GSA Trail Boss Program Manager, at (202) 501-1136 or at chuck.ross@gsa.gov.

Customs Procurement Partnering with Information Technology Group to Enhance IT Acquisition Performance

by Allen Marcus

U.S. Customs Service

Over the past year, the U. S. Customs' Procurement Division has "partnered" with the Office of Information and Technology to find ways to improve its work processes and communications. To resolve problems and improve the information technology acquisition process at Customs, a Partnership Steering Committee was formed and several teams consisting of Procurement, Office of Information and Technology (OIT) and Chief Counsel personnel were established by the Committee.

After mapping the IT process, sampling and interviewing, fifteen recommendations for improvement were made. Members of the Procurement Division, OIT and Chief Counsel voted on which recommendations to address. Twelve recommendations were accepted and the Partnership Steering Committee was formed, comprising of managers from Procurement and OIT. The Steering Committee reviewed and combined the recommendations to enable formation of six partnership teams.



The teams met over several months and each team member gained a better understanding of the other's roles and their problems. Each team developed a report and the reports were consolidated and presented to the Assistant Commissioners (Finance and Information Technology.) Changes to improve the process and working relationships included the establishment of a Procurement Partnership Counsel.

Its purpose is to promptly address problems and prepare for future technology acquisition strategies. An automated tracking tool accessible to all appropriate personnel will be utilized on Lotus Notes, and the IT acquisition standards



have been written. Technical evaluation team members will receive the needed training and will be devoted full time to their evaluation tasks. Monitoring of the panels' progress will be accomplished by the contracting officers.

Some of the recommendations were unique to the Procurement Division. These recommendations included (1) Procurement personnel needed to be more familiar with the technology they were acquiring; (2) the Procurement Division needed to continue its innovation efforts; (3) the OIT contract administration support needed improvement, and (4) the Procurement Division needed an established mechanism for reporting and sharing lessons-learned. Four "internal" Procurement teams developed solutions to these problems. They are, briefly stated:

- ! Procurement personnel will receive technology training by attending a pilot Information Technology Awareness class at the Treasury Acquisition Institute;
- ! The naming of an innovation advocate to looking into many agency and industry "best practices";
- ! Closer coordination between pre-award and post award procurement personnel to minimize disruption when newly awarded contracts are transferred for administration, and
- ! A shared data base for entering summaries of lessons-learned which will be accessible by Procurement, OIT and Chief Counsel personnel.

With an improved understanding of each organization's needs and effective teamwork, a strong commitment now exists for a successful IT acquisition program.

PEOPLE ON THE MOVE

New Employee

Mary Miron was selected as Team Leader for the Contracting Operations Group for the Customs Service Procurement Division. Mary has worked in DoD, IRS, and EPA. Her experience includes pre-award, administration (including TIPPS), and policy development. She served as IRS regional chief procurement officer in Cincinnati, and holds a law degree.

Recognition

NCMA Magazine - CPCM - While browsing through the

June 1997 edition of *Contract Management*, we noticed an article that presented the new Certified Professional Contracts Managers. Of the 70 or so names, we saw one Treasury employee listed. Congratulations to Paul J. Daniel, CPCM, Contract Specialist, Bureau of Engraving and Printing.

CONTRACTING VACANCIES IN TREASURY

U.S. Customs Service - Contract Administrator (GS-1102-12). Location - Washington, DC. Call Carolyn Golden at (202) 927-2541.

Bureau of Alcohol, Tobacco & Firearms - Purchasing Agent, GS-1105-5/6/7, #97-302-HO/vh. Location - Washington, DC. Call Human Resources at (202) 927-8610.

Office of the Comptroller of the Currency - Contract Specialist, OC-13 (possibly more than 1 position available). Location - Washington, DC. Call Human Resources at (202) 874-4590.

Bureau of the Public Debt - Contract Specialist (GS-1102-5/7 - promotion to GS-12). Location - Parkersburg, WV. Call Human Resources at (304) 480-7658.

Internal Revenue Service

The following announcements close 9/15/97, and the positions are located in the Constellation Centre in Oxon Hill, MD.

Supervisory Contract Administrator, GS-1102-14 (1), #97-M-0057-B-N; Contract Specialist/Contract Administrator, GS-1102-14 (1 or more), #97-M-0066-B-B; Procurement Analyst, GS-1102-14 (1 or more), #97-M-0065-B-N; Contract Specialist GS-1102-11 (1 or more), #97-M-0063-B-B; Contract Specialist/Contract Administrator, GS-1102-13 (1 or more), #97-M-0067-B-B.

Also available--Supervisory Contract Specialist, GS-1102-14, Chief Regional Procurement Officer in IRS Western Region, San Francisco, CA. Also, moving expenses are authorized. For more information or copies of all IRS procurement announcements, call Jacque Thornbrough on (202) 283-1253.

LOOK FOR MORE NEWS IN OCTOBER!

